

Volunteer Quality Alert 2006-03 – Interview and Intake Sheet February 24, 2006

Please share this message with all Volunteers immediately.

Use of the IRS Form 13614 (Interview and Intake Sheet) – or a partner-developed form incorporating the critical questions listed on the IRS form – is required at all volunteer sites nationwide. This form is assisting IRS to implement the new Return Review process. Volunteer sites selected for random site visits will be required to provide the IRS Reviewer with the completed Form 13614 (or partner-developed form) along with the tax return and supporting documents such as W-2's, 1099's, etc. for completion of the Return Review.

Return Reviews are now in their fourth week and we are seeing a few trends surrounding the Interview and Intake Sheet that we want to share with our partners:

- Some volunteer sites are not using an Interview and Intake Sheet.
- Some volunteer sites are using an Interview and Intake Sheet, but it is neither the IRS form nor a partner-developed form which incorporates the critical questions listed on the IRS Interview and Intake Sheet.
- Some volunteer sites are using an Interview and Intake Sheet; however, they are not being filled out completely.

We strongly encourage partners to communicate to their volunteers the requirement and importance of both using an Interview and Intake Sheet and ensuring that they are filled out completely. Working collaboratively, we can help increase return accuracy and decrease e-file rejects.

Taxpayers nationwide are benefiting immensely from the services provided by volunteer sites. We look forward to continuing our partnership efforts with you and assisting taxpayers with this valuable free tax preparation service.

For a training refresher, Volunteers can go to ...

- Volunteer Quality Alerts at the IRS website <http://www.irs.gov>. Enter the Keyword Community Network, scroll down to Partner Products and Volunteer Resource Center or go to <http://www.irs.gov/individuals/article/0,,id=120856,00.html>
- Publication 4012, Volunteer Resource Guide
- Link & Learn Taxes, <http://www.irs.gov/app/vita/index.jsp>
- Publication 678, Volunteer Student Guide
- Publication 4475, Volunteer Return Preparation Program Interview Techniques